



# Part A MAI Report: Annual Report Process

Part A Grantee  
Technical Assistance Conference Call

2 P.M. Eastern time, June 5, 2005

# Training Agenda

- Introductions & Training Objectives
- Overview of the New MAI Report:
  - What's New and What's Unchanged about the *Report*
  - The *Report* Data Elements
- Accessing the Report via Electronic Handbook (EHB)
- Working with the Web Forms
- Uploading the Required Report 'Narrative'
- Validating & Submitting the Report
- HRSA Review Process: What Grantees Can Expect
- Resources

Presenters:

- Melanie Wieland, Special Assistant to the Director  
HRSA, HIV/AIDS Bureau, Division of Service  
Systems
- Jillian Robey, Analyst, SAIC, Inc.
- Edouard Benjamin, Project Manager, SAIC, Inc.

# Overview of the New MAI Report

## What's Unchanged:

- Grantees will still submit an *MAI Annual Plan* and an *MAI Annual Report* (The two components of the “MAI Report” approved by the Office of Management and Budget in March 2007)
- Data elements remain the same
- A narrative must accompany both the *Plan* and the *Report*

# Overview of the New MAI Report

## Data Elements are the same

- Total MAI grant award amount
- Funds allocated/spent for grantee administration (5% cap for FY 2006)
- Total amount allocated for each service category
- Racial/ethnic communities to whom each service directed
- For each service provided to each racial/ethnic community:
  - Amount budgeted/spent, including carryover from prior fiscal years
  - Service unit definition
  - Planned/actual service units provided
  - Planned/actual total unduplicated number of clients
  - Planned/actual unduplicated number of women, youth, children and infants
  - **Plan**: Up to three planned client-level outcome measures
  - **Report**: Document client-level outcome results

# Overview of the New MAI Report

## What's New:

- Submit your *Plan* and *Report* via the EHB
- Enter data using web forms (no longer use Excel workbook)
- System checks to alert you to potential data-entry errors
- EHB will 'manage' the Project Officer review process
- Grantees can download a copy of their *Plan* or *Report*
- This fall: Grantees will be able to access prior year Reports and grantee-specific "*MAI Program Profile*"

# Overview: Part A MAI Report

- 2006 *MAI Annual Plan*:
  - Already loaded into system and available for review/download
  - Revisions: the MAI Data Support Team worked with grantees to enter any *Plan* changes. Additional changes cannot be made during submission of FY06 *Report*.
  
- 2006 *MAI Annual Report*:
  - Must submit via EHB
  - Submission period: June 11 – July 11, 2007
  - Deadline: July 11, 2007
  - **Critical**: Don't wait until the deadline!

# Overview: Part A MAI Report

## Looking Ahead:

- 2007 *MAI Annual Plan*:
  - Grantees submitted an initial *Plan* as part of the new competitive MAI grant application
  - A revised final *Plan* will be due 90 days after receiving the FY07 MAI Notice-of-Grant -Award, and will be submitted via EHB
  
- 2007 *MAI Annual Report*: Will also submit via EHB

# Getting Started: Access MAI Via EHB

- To Submit MAI Data Users Must Have:
  - EHBs user account
  - Part A (H89) grant in Portfolio
  - “Other Submissions” permissions for the Part A grant (assigned by Grantee Project Director)
- Step-by-step Web Demonstration at:
  - <https://performance.hrsa.gov/hab/ehbdemo/MAI>

# Getting Started....

1. Log into EHB
2. Click “View Portfolio” in the left menu
3. Select Part A (H89) grant
4. Click “Other Submissions” in the left menu
5. Click “Start Submission”
  - **NOTE:** User must have “Edit Other Submissions” privileges to start MAI Annual Report



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- Grants Portfolio
  - Add to Portfolio
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Welcome

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Contact Us:

Phone:

877-Go4-HRSA/877-464-4772;  
301-998-7373

Time:

9:00 a.m. to 5:30 p.m.  
Eastern Time (E.T.), Monday  
through Friday

Email:

[CallCenter@HRSA.GOV](mailto:CallCenter@HRSA.GOV)

Applicant/Grantee Electronic Handbook (EHB) provides all potential and existing grantees a means to conduct various activities electronically.

WHAT WOULD YOU LIKE TO DO TODAY?

Manage Competing Applications

- [Read Electronic Submission Guide](#)
- [Verify Grants.gov Application \(if Organization to work on My Application\)](#)
- [Search Funding Opportunities](#)

Manage Grants Portfolio

- [Read About Grant Registration](#)
- [Add a Grant to My Portfolio](#)
- [View Grants in My Portfolio](#)
- [Work on a Grant](#)
- [Work on My Noncompeting Application](#)
- [Work on Other Post Award Submissions](#)

Click the Work on Other Post Award Submissions link

Logout

**You will see a listing of all post-award reports available for submission through the EHBs for this grant**

Grant Handb

## Grant Menu

- Overview
- View Awards**
- Last NGA
- Award History
- Administer**
- New Users
- Existing Users
- Submissions**
- ▶ Monitor Schedules
- Noncompeting
- Continuations
- Performance Reports
- Other Submissions

Logout

Following is the list of post award submission requirements for this grant. You can click on the submission type to edit/view/submit the submissions. Online submission is currently not supported for submissions whose name does not appear as a link. You should continue to mail those submissions.

 **Note:** Please refer to all notice of grant awards for a complete list of post award submission requirements.

Displaying 1-5 of 5

Search

**MONITOR SCHEDULES**Input Parameters: ([Show Parameters](#))

Submission Name	Type	Due Date	Schedule Status	Reporting Cycle
<a href="#">Part A MAI Report</a>	<a href="#">Other Submissions</a>	7/1/2007	Not Started	CY (03/01/2006 - 02/28/2007)

Click the **Other Submissions** link



### Grant Handbook

#### Grant Menu

- Overview
- View Awards**
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- New Users
- Existing Users
- Submissions**
- Monitor Schedules
- Noncompeting
- Continuations
- Performance Reports
- ▶ **Other Submissions**

Logout

### Other Submissions

[home](#) | [logout](#) | [contact us](#) | [glossary](#) | [help](#) | [questions/comments](#)

The MAI Report is an "Other Submission" in the EHB Grant Handbook. You will see the MAI listed along with reporting and submission information

Displaying 1-1 of 1

Search

#### Other Submissions

Input Parameters: ([Show Parameters](#))

Schedule Status: <b>Not Started</b>			
Type	Other Submissions	Due Date	7/1/2007 11:59:59 PM
Available Date	6/1/2007 9:00:00 AM	Submission Tracking Number	000000
Reporting Cycle	Annual	Reporting Period	03/01/2006 - 02/28/2007
Online Submission		Submission	Not Started
Started by			
<a href="#">Start Submission</a>			

Click the Start Submission link

The **MAI System** will open in a separate window. This is where you will enter data to complete your MAI Reports.

will expire in: 29:52



[Help](#)

## Workflow - Inbox

Action List		MAI List										
Filter: Grant Year:		2006	▼	Report Type:	Annual	▼	Status:	Supervisor Review	▼	Page		
										Size:	15	▼
Page 1 of 1 (Total 1 Records)										<a href="#">[Help]</a>		
Year	Type	Grantee	Lock	Status	Open	Comments	History	Validate	Narrative			
2006	Annual		N/A		 Open				<a href="#">view</a>			

# Using the Web Forms: Steps 1A & 1B

## ■ Step 1:

- 1A: Grantee Information: Based on user registration
- 1B: Funding Information
  - a: Part A MAI Award Amount (read-only) – from Plan\*
  - b: MAI \$\$ Approved for Carryover
  - c: MAI Funds for Grantee Administration (read-only) – from Plan\*
- Click “Next Page” to Continue

# Using the Web Forms: Steps 1A & 1B

The Grantee Information Form (Step 1) page opens

HAB MAI

Data Entry | Workflow | Logout

MAI Administration

- Release Lock
- Validate
- Add Comments
- View Comments
- Print
- Upload Narrative
- View Narrative

MAI Navigation

- Customize MAI
  - Step 1
  - Step 2A
  - Step 2B
  - Step 3

MAI Report Sheets

- EIS-Asian
- Medical-Asian

## 2006 Annual Report

Step 1 of 3

Access Mode: **edit** - Data can be edited by: **None** only - MAI Status: **worki**

### CUSTOMIZE WORKBOOK

*This should be completed by all MAI Grantees.*

### Step 1: Grantee and Funding Information

Fields with a red star (\*) are required

#### 1A. Grantee Information:

- a. Prepared By:  \*
- b. Title:  \*
- c. Email:  \*
- d. Telephone:  \*

1A: Pre-Populated with Information from EHBs

#### 1B. Funding Information:

- a. Title I MAI Award:
- b. MAI \$\$ Approved For Carryover:  \*
- c. MAI Funds to Be Used for Grantee Administration:  (c)

1Ba: From Plan (Read Only)  
1Bb: Enter MAI \$\$ Approved for Carryover  
1Bc: From Plan (Read Only)

< Previous Page

Next Page >

Save

Restore Initial Values

Click the Next Page > button

# Web Forms: Steps 2A and 2B

- Step 2A: Service Categories (read-only)\*
  - Click “Next Page” to Continue
- Step 2B: Race/Ethnicity
  - Effort and Amounts Planned (read-only)\*

# Complete Web Forms: Step 3

- Step 3: Enter *Annual Report* Information for each Service Category/Race combination
  - Enter Approved Carryover Amount used to deliver a service to a specific community
  - Enter Amounts Spent
  - Actual Number of Service Units Provided
  - Actual Number of Clients Served
    - Total unduplicated number of clients served
    - Unduplicated women, youth, children, infants served
  - Outcome Results
  - Click “Save” to save data

# Web Forms: Complete Step 3

2006 Annual Report Access Mode: **edit** - Data can be edited by: **None** only - MAI Status

Data Entry: Please use the form below to complete

**Report Sheet: EIS-Asian**

**Service Information**

- Service or Activity:
- Ethnic or Racial Community To Receive This Service:
- New, Continuing, or Expanded Effort

**Budget and Expenditure Information**

	Plan	Annual
4A. FY MAI funds budgeted for this service to this client group:	\$ 3333	
4B. MAI carryover budgeted for this service to this client group:	\$	
4C. Total MAI funds budgeted or spent for this service to this client group:	\$3,333	\$ 2222

**Service Units**

- Service Unit Name and Definition:
- Record of service units provided:

	Plan	Annual
6. Record of service units provided:	524	3333

**Record of Clients Served**

	Plan	Annual
7A. Total Unduplicated Number of Clients:	344	222
7B. Total Unduplicated Number of Women:	566	233
7C. Total Unduplicated Number of Children:	566	458
7D. Total Unduplicated Number of Youth:	125	444
7E. Total Unduplicated Number of Elderly:	300	555

Click **Next Page >** button

< Previous Page    Next Page >    Save

**For Each Report Sheet Complete:**

- Approved Carryover
- Amount Spent
- Service Units Provided
- Number of Clients Served
- Outcome measure results

2. Amount Spent

1. Approved Carryover

3. Service Units Provided

4. Number of Clients Served

# Upload Narrative

- *Annual Report* narrative must be a **Word** or **WordPerfect** document
  1. Click “Upload Narrative” link in left menu
  2. Browse grantee computer to locate the completed narrative document file
  3. Click “Upload Narrative” button
  4. Confirmation

# Upload Narrative

<b>MAI Administration</b>	<b>2006 Annual Report</b>	Access Mode: <b>ed</b>
<a href="#">Release Lock</a>	<b>Data Entry: Please use the form below to complete each row</b>	
<a href="#">Validate</a>		Fields
<a href="#">Add Comments</a>	<b>Report Sheet: EIS-Asian</b>	
<a href="#">View Comments</a>	<b>Service Information</b>	
<a href="#">Print</a>	1. Service or Activity:	
<a href="#">Upload Narrative</a>	Community To Receive This Service	
<a href="#">View Narrative</a>	Expanded Effort	
<b>MAI Navigati</b>	<b>Service Information</b>	
<input type="checkbox"/> <a href="#">Customize</a>	4A. FY MAI funds budgeted for this service to this client group:	
- <a href="#">Step 1</a>	4B. MAI carryover budgeted for this service to this client group:	
- <a href="#">Step 2A</a>	4C. Total MAI funds budgeted or spent for this service to this client group:	
- <a href="#">Step 2B</a>	<b>Service Units</b>	
- <a href="#">Step 3</a>	5. Service Unit Name and Definition:	
<b>MAI Report Sheets</b>		
- <a href="#">EIS-Asian</a>		
- <a href="#">Medical-Asian</a>		

Click **Upload Narrative**

# Validate *Report*

- The MAI Report data system at HRSA will automatically check your *Report* for internal consistency and completeness.
- To start the validation process, click “Validate” in left menu.

# To Validate Report

U.S. Department of Health and Human Services



Health Resources and Services Administration

[Home](#)

**MAI Administration**      **2006 Annual Report**      A

[Release Lock](#)      **Data Entry: Please use the form below to con**

[Validate](#)      **Report Sheet: EIS-Asian**

[Add Comments](#)      **Service Information**

[View C](#)

[Print](#)      **Click Validate**

[Upload](#)

[View Narrative](#)      **Service or Activity:**

**MAI Navigation**

[Customize MAI](#)

- [Step 1](#)
- [Step 2A](#)
- [Step 2B](#)
- [Step 3](#)

**MAI Report Sheets**

- [EIS-Asian](#)
- [Medical-Asian](#)

2. Ethnic or Racial Community To Receive This Ser

3. New, Continuing, or Expanded Effort

**Budget and Expenditure Information**

4A. FY MAI funds budgeted for this service to this clie

4B. MAI carryover budgeted for this service to this clie

4C. Total MAI funds budgeted or spent for this service group:

**Service Units**

5. Service Unit Name and Definition:

# To Validate *Report*

1. A Validation Report will open in a new window with detailed information about any failed system checks (i.e., any detected problems)
2. Types of failed system-check messages:
  - Data Errors: Grantees must correct any data errors before you can submit the *Report* for review
  - Data Warning: If amount expended does not equal the budgeted (planned) amount, the grantee must provide a brief explanation note

# To Validate *Report*

1. Correct all errors
2. Respond to all warnings
3. When finished, re-validate the *Report*. It must 'pass' system checks before you can submit it.
4. If you experience a problem, contact the [CallCenter@hrsa.gov](mailto:CallCenter@hrsa.gov)  
By phone: 1-877-Go4-HRSA (1.877.464.4772)

# To Submit the *Report*

1. Click “Submit” in left menu
2. Enter comment
3. Click “*Submit for Project Officer Review*” button
4. Grantee and Project Officer will receive email notification that the *Annual Report* has been successfully submitted to HRSA for review

# To Submit the *Report*

U.S. Department of Health and Human Services

**HRSA**  
Health Resources and Services Administration

Home | Workflow | Access Mode: **edit**

MAI Administration **2006 Annual Report**

Release Lock  
Validate  
Add Comments  
View Comments  
Print  
Upload Narrative  
View Narrative

MAI Navigation

Customize Report  
- Step 1  
- Step 2A  
- Step 2B  
- Step 3

MAI Report Sheets  
- EIS-Asian  
- Medical-Asian

**2006 Annual Report** Access Mode: **edit**

Data Entry: Please use the form below to complete each report. Fields

**Report Sheet: EIS-Asian**

**Service Information**

1. Service or Activity:  
2. Client Group:  
3. Service for Racial Community To Receive This Service:  
4. Service Status: Continuing, or Expanded Effort

**Budget and Expenditure Information**

4A. FY MAI funds budgeted for this service to this client group:  
4B. MAI carryover budgeted for this service to this client group:  
4C. Total MAI funds budgeted or spent for this service to this client group:

**Service Units**

5. Service Unit Name and Definition:

**Click Submit**

# Download Workbook for Your Records

- The MAI Report Web Application generates an excel workbook containing all Annual Report Data
- Click “Download Workbook” in left menu
  - Workbook is Read Only
  - All changes to your Annual Report should be made online

# *MAI Annual Report Timeline*

- **June 11:** MAI Report System opens
- **July 11:** Deadline for FY06 MAI *Report*
- Project Officer will review *Report* and either *Approve* or *Reject* it for changes
- Grantees will receive email notification when their *Report* is approved or rejected

# MAI Annual Report Timeline

- If 'Rejected:'
  - The email sent to you will identify specific problems
  - The *Report* will automatically revert to “Working on” status in the EHB
  - To make revisions, use the EHB to access your *Report*. Follow the steps previously described to update/correct specific data elements.
  - When corrections/revisions completed, you must validate the *Report* again before submitting it.
  - You must also enter a comment when submitting the revised *Report*, briefly explaining revisions made.

# *MAI Annual Report* Timeline

- **Important:**

*Report* revisions must be completed by July 31.

Therefore, submit your *Report* well before the July 11 deadline so that you will have time to address any data validation issues or revisions requested by your Project Officer

# Resources

- Online Help

- <https://performance.hrsa.gov/hab/maiApp/help/>

- Updated 2006 MAI Annual Report Instructions

- HRSA Call Center

- [CallCenter@hrsa.gov](mailto:CallCenter@hrsa.gov)

- 1-877-Go4-HRSA (1.877.464.4772)